

Fairfax County Retirement Systems

Benefit Estimate Request

School Employee

Please Note: You may request an estimate if you are one year or less from your earliest retirement date.

Estimates may take 60 to 90 days to be prepared. If you are more than one year from your earliest retirement date, please visit the Retirement Systems website and establish an account. Use the Benefit Estimator to generate your own retirement and DROP benefit estimates. Please visit www.fairfaxcounty.gov/retirement/ and click on "Retirement Account Log-In" to establish an account and get started. For information on retirement classes, please visit www.fairfaxcounty.gov/retirement and click on the link for "Retirement Classes".

EMPLOYEE DATA			
Social Security # (Last 4 Digits)	Name (Last)	(First)	(Middle)
Agency/Job Title		Daytime Phone	
E-mail address		Date of Birth	
For information on Joint & Last Survivor Option, provide spouse information below:			
Name of Spouse		Date of Birth of Spouse	
Member's Signature: _____		Date: _____	

Specify retirement date to be used in estimate: _____, **OR** check the appropriate box.

First date eligible for normal service retirement **OR** First date eligible for early service retirement

***Please note:** All estimates are based on current information at the time the estimate was generated. You will be provided with an estimate for ONE retirement date. **If you request multiple dates, only the first date will be used to calculate your benefit.** Please see complete policy for estimate requests on the reverse (page 2).

I have some part-time service? Yes Dates: _____

Break(s) in service? Yes Dates: _____

Please provide me with a DROP estimate in addition to a Normal Service Retirement estimate.

(The option to participate in DROP is only available for Normal Service Retirement-eligible members.)

Please return this form to:

Fairfax County Retirement Systems Policy on Benefit Estimate Requests

The Retirement Systems policy is to provide an estimate of retirement benefits to individuals having less than one year before they are eligible for early retirement. Employees who are **within one year of their early retirement eligibility date** may request an estimate of their retirement benefits using the “Benefit Estimate Request” form. For information on optional Joint & Last Survivor (J&LS) benefits for your current legal spouse, please provide the name and date of birth of your spouse on the Benefit Estimate Request form.

Individuals are limited to one estimate request per calendar year. You may choose ONE date for us to calculate your benefit, OR you may check the box for earliest eligibility for normal retirement. If you provide multiple dates, only the first date listed will be used to do your calculation.

If you are **not** within one year of retirement eligibility, you can log in to your Retirement Account on the Retirement Systems website to calculate your own benefit estimates.

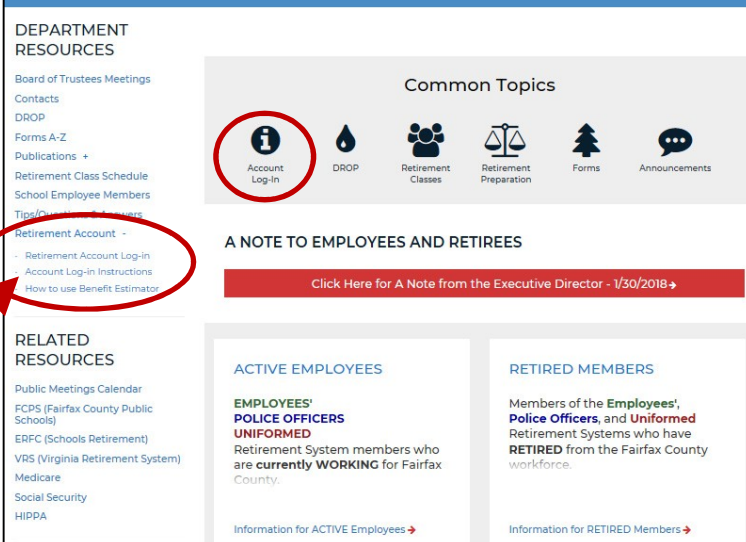
The Benefit Estimator allows members generate estimates based on individual assumptions of salary increases and variable retirement dates. DROP is included as an option when using the Benefit Estimator. Please check with your payroll contact if you have questions regarding sick leave or leave without pay balances.

FYI: Remember that every 172 hours of sick leave equates to one month of benefit service. You can visit the Retirement Systems website at www.fairfaxcounty.gov/retirement/ for more information on how sick leave can affect your retirement eligibility.

Completed Benefit Estimate Request forms can be faxed or mailed to the address on the other side of this form. Once your estimate request is received, and your retirement eligibility date is verified, your estimate will be calculated and mailed to your home address.

If you have difficulty understanding your retirement benefit estimate, please refer to your Fairfax County Retirement System Handbook or contact your Retirement Counselor. A copy of the Retirement System Handbook, for the System in which you are a member, can be found on the Retirement Systems website. The Retirement System Handbook is your best resource for examples and information regarding your retirement benefit.

To generate your own Benefit Estimates, visit the Retirement Systems website at
www.fairfaxcounty.gov/retirement/
and click on
[Retirement Account Log-in](#)
to establish an account and access the Benefit Estimator.
For detailed instructions, refer to “Account Log-in Instructions” and “How to Use Benefit Estimator”.



The screenshot shows the Retirement Systems website interface. On the left, there is a 'DEPARTMENT RESOURCES' sidebar with links like 'Board of Trustees Meetings', 'Contacts', 'DROP', 'Forms A-Z', 'Publications +', 'Retirement Class Schedule', 'School Employee Members', and 'Tips/Questions for Members'. The 'Tips/Questions for Members' section includes 'Retirement Account', 'Retirement Account Log-in', 'Account Log-in Instructions', and 'How to use Benefit Estimator'. The main content area features 'Common Topics' with icons for 'Account Log-in', 'DROP', 'Retirement Classes', 'Retirement Preparation', 'Forms', and 'Announcements'. Below this is a red banner for 'A NOTE TO EMPLOYEES AND RETIREES' with a link 'Click Here for A Note from the Executive Director - 1/30/2018'. At the bottom, there are sections for 'RELATED RESOURCES' (Public Meetings Calendar, FCPS, ERFC, VRS, Medicare, Social Security, HIPAA) and 'ACTIVE EMPLOYEES' (EMPLOYEES' POLICE OFFICERS UNIFORMED) and 'RETIRED MEMBERS'.